

Deployment Readiness Guide

What to have in place before your trial begins

Notate 2026 stores documents in SharePoint Embedded, Microsoft's modern storage layer, inside your own Microsoft 365 tenant. Your documents never touch a Shafer Systems server, and they stay within your existing compliance perimeter for Purview retention, DLP, eDiscovery, and audit.

Getting there takes six steps. Most are standard Microsoft 365 and Azure groundwork your team may already have done for other applications, and the Notate-specific part is about thirty minutes of work that we will walk through with you live. The point of this guide is so you can find out now which pieces you already have, rather than discovering it once the trial is running.

The six steps at a glance

Step	What it is	Who does it	Rough effort
1	Confirm your Microsoft 365 tenant and name your admins	M365 / Entra admin	15 minutes
2	Have an Azure subscription and a resource group ready	Azure admin	15 minutes
3	Turn on pay-as-you-go billing and SharePoint Embedded	M365 global admin	15 minutes
4	Grant Notate consent in Microsoft Entra ID	Entra admin	5 minutes
5	Ask Shafer Systems for your trial kit	You, plus us	One email
6	Run provisioning and publish two values to UEM	Azure admin, with us on the call	About 30 minutes

Steps 1 through 4 are things you can start today, independent of us. Step 5 is where we hand you the software. Step 6 is the part we do together.

Step 1. Confirm your tenant and name your admins

You need an active Microsoft 365 tenant with SharePoint Online. Beyond that, the whole setup rests on a small number of role assignments. Identifying who holds them is usually the slowest part of the process at a large organization, which is why it comes first.

Roles required

- **Microsoft Entra ID:** Global Administrator, or the combination of Application Administrator and Cloud Application Administrator.
- **Azure:** Owner or Contributor on the subscription, and Contributor on the resource group you will deploy into.
- **Microsoft Entra ID P1:** Only if you want to grant Notate access by security group. Per-user assignment works on any tier, and a dynamic group is the tidiest option if you have P1.

Worth doing early

One step of the setup runs PowerShell on an administrator's own machine rather than in a browser, because Microsoft requires that sign-in to return to a local browser. Have that administrator install the module ahead of time:

```
Install-Module Microsoft.Graph.Authentication -Scope CurrentUser
```

PowerShell 7 on Windows, macOS, or Linux, or Windows PowerShell 5.1, all work.

Step 2. Have an Azure subscription and a resource group ready

SharePoint Embedded bills pay-as-you-go against your own Azure subscription. Shafer Systems bills you nothing for storage and never sits in the payment path. You pay Microsoft, at Microsoft's rates, for storage you control.

What you will set up

- An Azure subscription, if you do not already have one you can use.
- A resource group inside it, which acts as the billing anchor for all SharePoint Embedded consumption. The same resource group will host the small provisioning function from step 6.

Three things worth knowing

- **Choose the region deliberately.** The provisioning function deploys into the resource group's region, and your subscription needs App Service quota there. Many subscriptions carry zero quota in some regions. If you have no reason to prefer one, East US 2 or South Central US are safe choices.
- **There are three billing meters:** storage by the gigabyte, Microsoft Graph API transactions, and egress by the gigabyte. Downloads to Office desktop and web apps are exempt from egress.
- **Costs are modest and observable.** You pay only for what you use, and you can watch it in Azure Cost Management filtered by the SharePoint Embedded product. Usage takes up to 24 hours to appear.

Step 3. Turn on pay-as-you-go billing and SharePoint Embedded

This is a short sequence in the Microsoft 365 admin center, and it is the one hard gate in the process. No user can reach Notate storage until it is complete.

- Sign in to admin.microsoft.com and go to Setup, then the Billing and licenses section.
- Select Activate pay-as-you-go services, then Get Started.
- On the Settings tab, select Apps, then choose SharePoint Embedded, and follow the on-screen instructions.
- Select your Azure subscription, resource group, and region when prompted.
- Once pay-as-you-go is enabled, select SharePoint Embedded again and press Turn On.

Step 4. Grant Notate consent in Microsoft Entra ID

Before anyone can sign in, an administrator has to authorize Notate as an enterprise application. The simplest route is for an Azure administrator to launch Notate on any device, sign in with their admin account, and approve the permissions when prompted. Once that is done, everyone else in the organization signs in normally.

If you would rather configure it manually, add Notate under Microsoft Entra ID, Enterprise Applications, using application ID 215843d3-1ef5-43d0-9b0f-76d16094ae79. That ID is the same across iOS, Android, Mac, and Windows. You can grant admin consent using the consent URL:

https://login.microsoftonline.com/<your-tenant-id>/adminconsent?client_id=215843d3-1ef5-43d0-9b0f-76d16094ae79

If a user tries to sign in before consent is granted, they will see an authorization error. Nothing is broken, and nothing is needed from the user. An administrator simply has to consent first.

Step 5. Ask us for your trial kit

This is the point where you tell us you are ready and we send you everything Notate-specific. Reach out to your Shafer Systems representative, or write to sales@shafersystems.com.

What we send you

- Your trial license key.
- The provisioning package: notate-provisioning.zip, the deployment template main.bicep, and the registration script Set-NotateContainerTypeRegistration.ps1.
- The BlackBerry UEM configuration file and connectivity guidance.

- The full Notate 2026 Overview and Administrator's Guide, which documents every step in detail with screenshots.

What helps us prepare it

- How many seats you want in the trial, and which group of users.
- Your BlackBerry UEM version.
- Whether the AI assistant and meeting transcription are in scope. They are optional and run on your own Azure OpenAI resource, so they add a small amount of setup.

Step 6. Provisioning, and the two values you publish to UEM

Microsoft requires that SharePoint Embedded containers be created by a service identity rather than by a mobile application. Rather than run a server of our own and break the promise that your data never leaves your tenant, Notate ships a small provisioning service that you deploy inside your own Azure subscription. It creates a user's storage container the first time they need one, and does nothing else. It never sees a document.

Plan for about thirty minutes. Nearly all of it happens in your browser, in the Entra and Azure portals and the browser-based Azure Cloud Shell. We are glad to run this live with your team rather than hand you a PDF.

What the session covers

- Register a single-purpose provisioning application in Entra, with exactly one delegated Graph permission.
- Deploy a small serverless Azure Function into your resource group. It runs roughly once per user, ever, so its cost is effectively nothing.
- Wire a passwordless credential using the function's Azure managed identity, so there is no secret to store or rotate.
- Register Notate's container type in your tenant. This is the PowerShell step from the note in step 1.
- Choose who may have a container provisioned, using standard Entra assignment, so it composes with your Conditional Access and access review policies.
- Publish two values to BlackBerry UEM: `NotateProvisioningEndpoint` and `NotateProvisioningAppId`.
- Verify by signing a pilot user into Notate. Their container is created automatically on first launch, with no prompts and nothing for them to configure.

What your security team will want to know

- **Nothing leaves your tenant.** The provisioning service runs on your Azure, under your control. Shafer Systems hosts nothing and holds no credential of yours.
- **Your compliance tooling still applies.** Notate's containers sit inside your Microsoft 365 tenant, covered by Purview retention, DLP, eDiscovery, and native audit logging. A retention policy scoped to all SharePoint sites picks them up automatically.

Questions

If anything here is unclear, or you would like us to walk your Azure and UEM administrators through the setup on a call before the trial starts, just ask. We would rather spend thirty minutes with your team than have you work through it alone.

Shafer Systems | sales@shafersystems.com | support@shafersystems.com